

Eligibility Transaction Procedures

This section details the procedures necessary to complete each of the following eligibility transactions using the Point of Service (POS) device:

- Eligibility Inquiry
- Share of Cost (Spend Down)
- Share of Cost (SOC) Reversal
- Medi-Services (Medical Services Reservation)
- Medi-Services (MS) Reversal

Providers must verify Medi-Cal subscriber (recipient) eligibility prior to rendering services each calendar month. For more information about eligibility or Medi-Services, refer to the *Eligibility: Recipient Identification* section of the Medi-Cal Part 1 provider manual. For more information about Share of Cost, refer to the *Share of Cost (SOC)* section of the Part 1 provider manual.

If you have questions regarding the operation of the POS device, call the Telephone Service Center (TSC) at 1-800-541-5555 and select the option for POS/Internet inquiries.

Overview

The Medi-Cal eligibility verification system returns an Eligibility Verification Control (EVC) number for each Eligibility Inquiry transaction submitted for subscribers eligible for Medi-Cal services during the specified month.

Note the following:

- You can press <F1> for help in any screen except the Shortcut Key, Response Message and Menu screens.
- The <EXIT> and <F8> keys are disabled during the initial entry of transaction information.
- At any time during re-edit, you can press <EXIT> or <F8> to return to the Send/Re-Edit screen.
- When you see a (↓) character on the screen, press <NEXT> on the keypad or the DOWN ARROW key or <PgDn> on the keyboard to display the next screen. When you see a (↑) character on the screen, press <PREV> on the keypad or the UP ARROW key or <PgUp> on the keyboard to display the previous screen.

Beginning a Transaction

Use the following two steps to begin an Eligibility transaction.

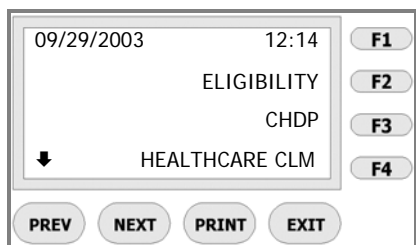


1. The first screen on the POS device is the Welcome screen. To get started, you may either swipe a Benefits Identification Card (BIC) or a Health Access Programs (HAP) card through the card reader, or press any key.

If you swipe a BIC or a HAP card, the subscriber information coded on the magnetic strip automatically displays in certain screens as you advance through the transaction. To accept the information, press <ENTER> when you reach the screen.

If you do not swipe a BIC or HAP card, you must type the requested information in each screen and press <ENTER>.

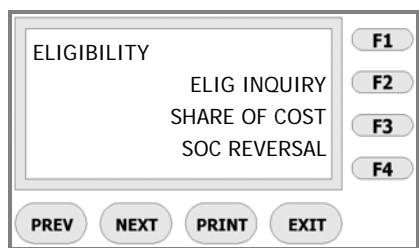
Note: You need to obtain the issue date from the BIC or HAP card to successfully submit an Eligibility transaction.



2. After swiping a BIC or HAP card or pressing any key, this screen (or a similar screen) will display. This is the Main Menu screen. Press the Function (F) key corresponding to ELIGIBILITY. In this example, press <F2>.

Performing an Eligibility Inquiry

This section contains instructions for performing an Eligibility Inquiry transaction using the POS device.



1. Eligibility Menu

The Eligibility Menu screen displays after performing steps 1 and 2 of the previous section. Select ELIG INQUIRY by pressing the corresponding Function (F) key. In this example, press <F2>.

2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. Otherwise, press <ENTER> to bypass this screen. For more information about the shortcut key, refer to the *Device System Transactions* section of this user guide.

3. Service Provider Number

If you entered a shortcut key in the previous step, this screen will automatically display your service provider number; press <ENTER> to accept the displayed value. Otherwise, type your service provider number and press <ENTER>.

4. Password

The POS device will prompt you to enter your password, which is your Provider Identification Number (PIN). Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

5. Subscriber ID

The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.

6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

Note: If you are billing for services to a newborn infant using the mother's ID number, you must type the mother's birth date in this screen, not the infant's.

elig trans

4

ELIG INQUIRY

ISSUE DATE: YY-MM-DD

F1 F2 F3 F4

PREV NEXT PRINT EXIT

7. Issue Date

The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

Note: If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.

ELIG INQUIRY

SERVICE DATE: CCYY-MM-DD

F1 F2 F3 F4

PREV NEXT PRINT EXIT

8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".

ELIG INQUIRY

SEND RE-EDIT SOC MS

F1 F2 F3 F4

PREV NEXT PRINT EXIT

9. Send/Re-Edit Screen

After all Eligibility Inquiry screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your Eligibility Inquiry transaction to the Medi-Cal eligibility verification system. Continue at step 11.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 10.
- Press <F3> (SOC) to perform a Share of Cost transaction.
- Press <F4> (MS) to make a Medi-Services reservation.

ELIG INQUIRY

ENTER SHORTCUT KEY:

F1 F2 F3 F4

PREV NEXT PRINT EXIT

10. If you pressed <F2> (RE-EDIT) in step 9, the POS device will display the first screen of your Eligibility Inquiry transaction, the Shortcut Key screen. You can scroll through the screens by pressing <NEXT> and <PREV>.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

ELIG INQUIRY

DIAL PRIMARY. . .

F1
F2
F3
F4

PREV NEXT PRINT EXIT

11. Several screens display, including the screens at left, while the transaction is processing.

ELIG INQUIRY

RECEIVING. . .

F1
F2
F3
F4

PREV NEXT PRINT EXIT

ELIG INQUIRY

RESPONSE RECEIVED
PRESS PRINT KEY TO
GENERATE RECEIPT
OR ANY KEY TO
CONTINUE

F1
F2
F3
F4

PREV NEXT PRINT EXIT

12. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.

ELIG INQUIRY

LAST NAME: DOE JO.
EVC #: XXXXXXXXXX
CNTY CODE: XX. PRMY
AID CODE: XX.
MEDI-CAL ELIGIBLE
↓ W/NO SOC.

F1
F2
F3
F4

PREV NEXT PRINT EXIT

13. If the subscriber is eligible, the POS device will display an eligibility response message that includes an Eligibility Verification Control (EVC) number. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen to perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

↑ HEALTH ELIG INQUIRY

PLAN MEMBER:
PLTCCM-ALTA MED
SENIOR BUENACARE:
MEDICAL/DENTAL CALL
555 999 9999.

F1
F2
F3
F4

PREV NEXT PRINT EXIT

ELIG INQUIRY
NO RECORDED
ELIGIBILITY FOR
12/03.

F1
F2
F3
F4

PREV NEXT PRINT EXIT

14. If the subscriber is not eligible, the POS device will display a "NO RECORDED ELIGIBILITY FOR (MONTH) (YEAR)" message. Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen.

Note: Providers need to verify that the information entered was correct before denying Medi-Cal services to the subscriber.

ELIG INQUIRY
PROVIDER NOT FOUND

F1
F2
F3
F4

PREV NEXT PRINT EXIT

15. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

Performing a Share of Cost Transaction

This section contains instructions for performing a Share of Cost (Spend Down) transaction using the POS device.

ELIGIBILITY

ELIG INQUIRY
SHARE OF COST
SOC REVERSAL

F1
F2
F3
F4

PREV NEXT PRINT EXIT

1. Eligibility Menu

The Eligibility Menu screen displays after performing steps 1 and 2 of the "Beginning a Transaction" section. Select SHARE OF COST by pressing the corresponding Function (F) key. In this example, press <F3>.

SHARE OF COST

ENTER SHORTCUT KEY:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. Otherwise, press <ENTER> to bypass this screen. For more information about the shortcut key, refer to the *Device System Transactions* section of this user guide.

SHARE OF COST

SERVICE PROVIDER
NUMBER:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

3. Service Provider Number

If you entered a shortcut key in the previous step, this screen will automatically display your service provider number; press <ENTER> to accept the displayed value. Otherwise, type your service provider number and press <ENTER>.

SHARE OF COST

PASSWORD:

PREV NEXT PRINT EXIT

F1 F2 F3 F4

4. Password

The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

SHARE OF COST

SUBSCRIBER ID:

PREV NEXT PRINT EXIT

F1 F2 F3 F4

5. Subscriber ID

The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.

SHARE OF COST

SUBSCRIBER BIRTH DATE:

CCYY-MM-DD

PREV NEXT PRINT EXIT

F1 F2 F3 F4

6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

Note: If you are billing for services to a newborn infant using the mother's ID number, you must type the mother's birth date in this screen, not the infant's.

SHARE OF COST

ISSUE DATE:

YY-MM-DD

PREV NEXT PRINT EXIT

F1 F2 F3 F4

7. Issue Date

The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

Note: If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.

elig trans

8

SHARE OF COST

SERVICE DATE:
CCYY-MM-DD

F1
F2
F3
F4

PREV NEXT PRINT EXIT

8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".

SHARE OF COST

CASE NUMBER:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

9. Case Number

The POS device will prompt you to enter a case number. Type the case number and press <ENTER>, or press <ENTER> to bypass this screen. You only need to enter a case number if the subscriber is affected by the Sneede v. Kizer lawsuit and presents a *Share of Cost Case Summary* form listing all the subscriber's case numbers. For more information, refer to the *Share of Cost (SOC)* section of the Part 1 provider manual.

Note: If the subscriber has multiple case numbers, you must submit a separate SOC transaction for each case number the subscriber wants to clear.

SHARE OF COST

PROCEDURE CODE:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

10. Procedure Code

The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.

SHARE OF COST

SOC (SPEND DOWN) AMT:
\$

F1
F2
F3
F4

PREV NEXT PRINT EXIT

11. SOC (Spend Down) Amount

The POS device will prompt you to enter the SOC (spend down) amount, also referred to as a Share of Cost (SOC) or patient paid amount. Type the spend down amount and press <ENTER>. You may enter up to \$99999.99 in this screen.

SHARE OF COST

TOTAL CLAIM CHARGE:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

12. Total Claim Charge

The POS device will prompt you to enter the total claim charge. Type the total charges for the services rendered and press <ENTER>. You may enter up to \$99999.99 in this screen.

13. Send/Re-Edit Screen

After all Share of Cost screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your Share of Cost transaction to the Medi-Cal eligibility verification system. Continue at step 15.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 14.

14. If you pressed <F2> (RE-EDIT) in step 13, the POS device will display the first screen of your Share of Cost transaction, the Shortcut Key screen. You can scroll through the screens by pressing <NEXT> and <PREV>.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

15. Several screens display, including the screens at left, while the transaction is processing.

SHARE OF COST

RESPONSE RECEIVED
PRESS PRINT KEY TO
GENERATE RECEIPT
OR ANY KEY TO
CONTINUE

PREV NEXT PRINT EXIT

F1 F2 F3 F4

16. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.

SHARE OF COST

LAST NAME: DOE JO.
EVC #: XXXXXXXXXX.
CNTY CODE: 01
AMOUNT DEDUCTED: \$5.00.
REMAINING SOC \$ 115.00.
↓ SOC CLEARANCE APPLIED.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

17. If the subscriber has a Share of Cost, the POS device will display a response message indicating that the SOC clearance was applied. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

SHARE OF COST

LAST NAME: DOE JO
RECIP DOES NOT HAVE
SOC. SOC CLEARANCE
REJECTED.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

18. If the subscriber does not have a Share of Cost, the POS device will display a response message indicating that the SOC clearance was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

SHARE OF COST

PROVIDER NOT FOUND

PREV NEXT PRINT EXIT

F1 F2 F3 F4

19. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

Performing a SOC Reversal Transaction

This section contains instructions for performing an SOC (Share of Cost) Reversal transaction using the POS device.

SOC Reversals may only be performed for partial clearance prior to when the subscriber is certified as eligible. Once a subscriber has been certified as having met the Share of Cost, reversal transactions can no longer be performed.

ELIGIBILITY

ELIG INQUIRY

SHARE OF COST

SOC REVERSAL

PREV NEXT PRINT EXIT

F1 F2 F3 F4

1. Eligibility Menu

The Eligibility Menu screen displays after performing steps 1 and 2 of the “Beginning a Transaction” section. Select SOC REVERSAL by pressing the corresponding Function (F) key. In this example, press <F4>.

SOC REVERSAL

ENTER SHORTCUT KEY:

PREV NEXT PRINT EXIT

F1 F2 F3 F4

2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. Otherwise, press <ENTER> to bypass this screen. For more information about the shortcut key, refer to the *Device System Transactions* section of this user guide.

SOC REVERSAL

SERVICE PROVIDER
NUMBER:

PREV NEXT PRINT EXIT

F1 F2 F3 F4

3. Service Provider Number

If you entered a shortcut key in the previous step, this screen will automatically display your service provider number; press <ENTER> to accept the displayed value. Otherwise, type your service provider number and press <ENTER>.

SOC REVERSAL

PASSWORD:

PREV NEXT PRINT EXIT

F1 F2 F3 F4

4. Password

The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

SOC REVERSAL

SUBSCRIBER ID:

PREV NEXT PRINT EXIT

F1 F2 F3 F4

5. Subscriber ID

The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.

The screenshot shows a POS device screen with the title "SOC REVERSAL". Below the title, it says "SUBSCRIBER BIRTH DATE:" followed by a text input field containing "CCYY-MM-DD". To the right of the screen are four function keys labeled F1, F2, F3, and F4. At the bottom of the screen are four buttons labeled PREV, NEXT, PRINT, and EXIT.

6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

Note: If you are billing for services to a newborn infant using the mother's ID number, you must type the mother's birth date in this screen, not the infant's.

The screenshot shows a POS device screen with the title "SOC REVERSAL". Below the title, it says "ISSUE DATE:" followed by a text input field containing "YY-MM-DD". To the right of the screen are four function keys labeled F1, F2, F3, and F4. At the bottom of the screen are four buttons labeled PREV, NEXT, PRINT, and EXIT.

7. Issue Date

The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

Note: If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.

The screenshot shows a POS device screen with the title "SOC REVERSAL". Below the title, it says "SERVICE DATE:" followed by a text input field containing "CCYY-MM-DD". To the right of the screen are four function keys labeled F1, F2, F3, and F4. At the bottom of the screen are four buttons labeled PREV, NEXT, PRINT, and EXIT.

8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".

The screenshot shows a POS device screen with the title "SOC REVERSAL". Below the title, it says "CASE NUMBER:" followed by a text input field. To the right of the screen are four function keys labeled F1, F2, F3, and F4. At the bottom of the screen are four buttons labeled PREV, NEXT, PRINT, and EXIT.

9. Case Number

The POS device will prompt you to enter a case number. Type the case number and press <ENTER>, or press <ENTER> to bypass this screen. You only need to enter a case number if the subscriber is affected by the Sneede v. Kizer lawsuit and presents a *Share of Cost Case Summary* form listing all the subscriber's case numbers. For more information, refer to the *Share of Cost (SOC)* section of the Part 1 provider manual.

Note: If the subscriber has multiple case numbers, you must submit a separate SOC transaction for each case number the subscriber wants to clear.

10. Procedure Code

The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.

11. SOC (Spend Down) Amount

The POS device will prompt you to enter the SOC (spend down) amount, also referred to as a Share of Cost (SOC) or patient paid amount. Type the spend down amount and press <ENTER>. You may enter up to \$99999.99 in this screen.

12. Total Claim Charge

The POS device will prompt you to enter the total claim charge. Type the total charges for the services rendered and press <ENTER>. You may enter up to \$99999.99 in this screen.

13. Send/Re-Edit Screen

After all SOC Reversal screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your SOC Reversal transaction to the Medi-Cal eligibility verification system. Continue at step 15.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 14.

elig trans

14

SOC REVERSAL

ENTER SHORTCUT KEY:

F1 F2 F3 F4

PREV NEXT PRINT EXIT

14. If you pressed <F2> (RE-EDIT) in step 13, the POS device will display the first screen of your SOC Reversal transaction, the Shortcut Key screen. You can scroll through the screens by pressing <NEXT> and <PREV>.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

SOC REVERSAL

DIAL PRIMARY. . .

F1 F2 F3 F4

PREV NEXT PRINT EXIT

15. Several screens display, including the screens at left, while the transaction is processing.

SOC REVERSAL

RECEIVING. . .

F1 F2 F3 F4

PREV NEXT PRINT EXIT

SOC REVERSAL

RESPONSE RECEIVED
PRESS PRINT KEY TO
GENERATE RECEIPT
OR ANY KEY TO
CONTINUE

F1 F2 F3 F4

PREV NEXT PRINT EXIT

16. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.

SOC REVERSAL
LAST NAME: DOE JO.
EVC #: XXXXXXXXXX.
CNTY CODE: 01.
AMOUNT ADDED: \$5.00.
REMAINING SOC \$120.
↓ SOC REVERSAL APPLIED.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

17. If the subscriber has a Share of Cost, the POS device will display a response message indicating that the SOC reversal was applied. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

SOC REVERSAL
LAST NAME: DOE JO.
RECIP DOES NOT HAVE
SOC. SOC REVERSAL
REJECTED.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

18. If the subscriber does not have a Share of Cost, the POS device will display a response message indicating that the SOC reversal was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

SOC REVERSAL
INVALID PASSWORD

PREV NEXT PRINT EXIT

F1 F2 F3 F4

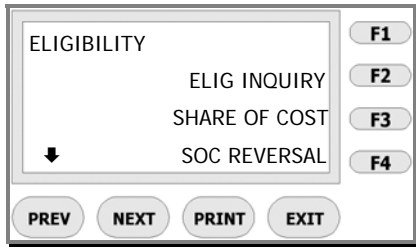
19. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

Performing a Medi-Services Transaction

This section contains instructions for performing a Medi-Services (Medical Services Reservation) transaction using the POS device.

Only certain providers can reserve and submit claims for Medi-Services. For more information about Medi-Services, refer to the *Eligibility: Recipient Identification* section of the Part 1 provider manual.



ELIGIBILITY

↓

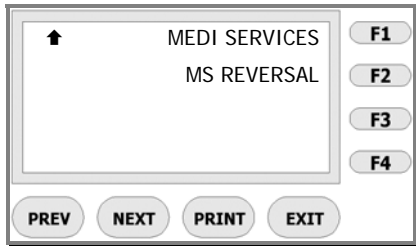
ELIG INQUIRY
SHARE OF COST
SOC REVERSAL

F1
F2
F3
F4

PREV NEXT PRINT EXIT

1. Eligibility Menu

The Eligibility Menu screen displays after performing steps 1 and 2 of the "Beginning a Transaction" section. Press <NEXT> on the keypad or the DOWN ARROW key or <PgDn> on the keyboard to display the lower portion of the Eligibility Menu screen. Select MEDI SERVICES by pressing the corresponding Function (F) key. In this example, press <F1>.



↑

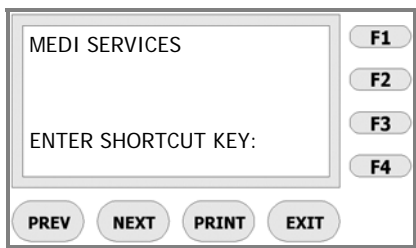
MEDI SERVICES
MS REVERSAL

F1
F2
F3
F4

PREV NEXT PRINT EXIT

2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. Otherwise, press <ENTER> to bypass this screen. For more information about the shortcut key, refer to the *Device System Transactions* section of this user guide.



MEDI SERVICES

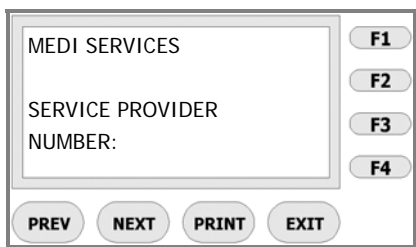
ENTER SHORTCUT KEY:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

3. Service Provider Number

If you entered a shortcut key in the previous step, this screen will automatically display your service provider number; press <ENTER> to accept the displayed value. Otherwise, type your service provider number and press <ENTER>.



MEDI SERVICES

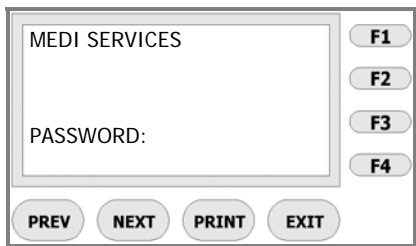
SERVICE PROVIDER
NUMBER:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

4. Password

The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.



MEDI SERVICES

PASSWORD:

F1
F2
F3
F4

PREV NEXT PRINT EXIT

The screen displays 'MEDI SERVICES' at the top. Below it is a large text input field labeled 'SUBSCRIBER ID:'. To the right of the input field are four function keys: F1, F2, F3, and F4. At the bottom of the screen are four navigation buttons: PREV, NEXT, PRINT, and EXIT.

5. Subscriber ID

The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.

The screen displays 'MEDI SERVICES' at the top. Below it is a large text input field labeled 'SUBSCRIBER BIRTH DATE:'. To the right of the input field are four function keys: F1, F2, F3, and F4. At the bottom of the screen are four navigation buttons: PREV, NEXT, PRINT, and EXIT. The input field contains the placeholder text 'CCYY-MM-DD'.

6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

Note: If you are billing for services to a newborn infant using the mother's ID number, you must type the mother's birth date in this screen, not the infant's.

The screen displays 'MEDI SERVICES' at the top. Below it is a large text input field labeled 'ISSUE DATE:'. To the right of the input field are four function keys: F1, F2, F3, and F4. At the bottom of the screen are four navigation buttons: PREV, NEXT, PRINT, and EXIT. The input field contains the placeholder text 'YY-MM-DD'.

7. Issue Date

The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

Note: If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.

The screen displays 'MEDI SERVICES' at the top. Below it is a large text input field labeled 'SERVICE DATE:'. To the right of the input field are four function keys: F1, F2, F3, and F4. At the bottom of the screen are four navigation buttons: PREV, NEXT, PRINT, and EXIT. The input field contains the placeholder text 'CCYY-MM-DD'.

8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".

The screenshot shows a terminal window titled "MEDI SERVICES". Inside the window, there is a label "PROCEDURE CODE:" followed by a blank input field. To the right of the window are four function keys labeled F1, F2, F3, and F4. Below the window are four buttons labeled PREV, NEXT, PRINT, and EXIT.

9. Procedure Code

The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.

The screenshot shows a terminal window titled "MEDI SERVICES". The window is split into two sections. The left section is empty. The right section contains the text "SEND" and "RE-EDIT". To the right of the window are four function keys labeled F1, F2, F3, and F4. Below the window are four buttons labeled PREV, NEXT, PRINT, and EXIT.

10. Send/Re-Edit Screen

After all Medi-Services screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your Medi-Services transaction to the Medi-Cal eligibility verification system. Continue at step 12.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 11.

The screenshot shows a terminal window titled "MEDI SERVICES". Inside the window, there is a label "ENTER SHORTCUT KEY:" followed by a blank input field. To the right of the window are four function keys labeled F1, F2, F3, and F4. Below the window are four buttons labeled PREV, NEXT, PRINT, and EXIT.

11. If you pressed <F2> (RE-EDIT) in step 10, the POS device will display the first screen of your Medi-Services transaction, the Shortcut Key screen. You can scroll through the screens by pressing <NEXT> and <PREV>.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

MEDI SERVICES

DIAL PRIMARY. . .

F1
F2
F3
F4

PREV NEXT PRINT EXIT

12. Several screens display, including the screens at left, while the transaction is processing.

MEDI SERVICES

RECEIVING. . .

F1
F2
F3
F4

PREV NEXT PRINT EXIT

MEDI SERVICES

RESPONSE RECEIVED
PRESS PRINT KEY TO
GENERATE RECEIPT
OR ANY KEY TO
CONTINUE

F1
F2
F3
F4

PREV NEXT PRINT EXIT

13. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.

MEDI SERVICES

LAST NAME: DOE JO.
MEDI SVC
RESERVATION
APPLIED. # OF MEDI
SVCS REMAINING FOR
MONTH OF SVC
ENTERED : 0

F1
F2
F3
F4

PREV NEXT PRINT EXIT

14. If the subscriber is eligible and has Medi-Services remaining, the POS device will display a response message indicating that the Medi-Services reservation was applied, as well as the number of Medi-Services remaining. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

MEDI SERVICES

LAST NAME: DOE JO.
NO MORE MEDI SVC
AVAILABLE FOR
12/03. MEDI SVC
RESERVATION
REJECTED.

F1
F2
F3
F4

PREV NEXT PRINT EXIT

15. If the subscriber is eligible and does not have Medi-Services remaining, the POS device will display a response message indicating that the Medi-Services reservation was not applied and that no more Medi-Services are available. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

MEDI SERVICES
MEDI SVC
RESERVATION
REJECTED.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

16. If the subscriber has a Share of Cost that has not been cleared, the POS device will display a response message indicating that the Medi-Services reservation was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

MEDI SERVICES
NO RECORDED
ELIGIBILITY FOR
12/03.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

17. If the subscriber is not eligible, the POS device will display a "NO RECORDED ELIGIBILITY FOR (MONTH) (YEAR)" message. Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen.

Note: Providers need to verify that the information entered was correct before denying Medi-Cal services to the subscriber.

MEDI SERVICES
PROVIDER NOT FOUND

PREV NEXT PRINT EXIT

F1 F2 F3 F4

18. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

Performing a Medi-Services Reversal Transaction

This section contains instructions for performing a Medi-Services (MS) Reversal transaction using the POS device.

ELIGIBILITY

ELIG INQUIRY
SHARE OF COST
↓ SOC REVERSAL

PREV NEXT PRINT EXIT

F1 F2 F3 F4

1. Eligibility Menu

The Eligibility Menu screen displays after performing steps 1 and 2 of the "Beginning a Transaction" section. Press <NEXT> on the keypad or the DOWN ARROW key or <PgDn> on the keyboard to display the lower portion of the Eligibility Menu screen. Select MS REVERSAL by pressing the corresponding Function (F) key. In this example, press <F2>.

↑ MEDI SERVICES
MS REVERSAL

PREV NEXT PRINT EXIT

F1 F2 F3 F4

2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. Otherwise, press <ENTER> to bypass this screen. For more information about the shortcut key, refer to the *Device System Transactions* section of this user guide.

3. Service Provider Number

If you entered a shortcut key in the previous step, this screen will automatically display your service provider number; press <ENTER> to accept the displayed value. Otherwise, type your service provider number and press <ENTER>.

4. Password

The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

5. Subscriber ID

The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.

6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

Note: If you are billing for services to a newborn infant using the mother's ID number, you must type the mother's birth date in this screen, not the infant's.

MS REVERSAL

ISSUE DATE: YY-MM-DD

F1 F2 F3 F4

PREV NEXT PRINT EXIT

7. Issue Date

The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

Note: If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.

MS REVERSAL

SERVICE DATE: CCYY-MM-DD

F1 F2 F3 F4

PREV NEXT PRINT EXIT

8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".

MS REVERSAL

PROCEDURE CODE:

F1 F2 F3 F4

PREV NEXT PRINT EXIT

9. Procedure Code

The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.

MS REVERSAL

SEND RE-EDIT

F1 F2 F3 F4

PREV NEXT PRINT EXIT

10. Send/Re-Edit Screen

After all MS Reversal screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your MS Reversal transaction to the Medi-Cal eligibility verification system. Continue at step 12.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 11.

MS REVERSAL

ENTER SHORTCUT KEY:

F1 F2 F3 F4

PREV NEXT PRINT EXIT

11. If you pressed <F2> (RE-EDIT) in step 10, the POS device will display the first screen of your MS Reversal transaction, the Shortcut Key screen. You can scroll through the screens by pressing <NEXT> and <PREV>.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

MS REVERSAL

DIAL PRIMARY. . .

F1 F2 F3 F4

PREV NEXT PRINT EXIT

12. Several screens display, including the screens at left, while the transaction is processing.

MS REVERSAL

RECEIVING. . .

F1 F2 F3 F4

PREV NEXT PRINT EXIT

MS REVERSAL

RESPONSE RECEIVED
PRESS PRINT KEY TO
GENERATE RECEIPT
OR ANY KEY TO
CONTINUE

F1 F2 F3 F4

PREV NEXT PRINT EXIT

13. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.

MS REVERSAL
LAST NAME: DOE JO.
MEDI SVC REVERSAL
APPLIED. # OF MEDI
SVCS REMAINING FOR
MONTH OF SVC
ENTERED : 0

PREV NEXT PRINT EXIT

F1 F2 F3 F4

14. If the subscriber is eligible and has a Medi-Services reservation applied, the POS device will display a response message indicating that the Medi-Services reversal was applied, as well as the number of Medi-Services remaining. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

MS REVERSAL
LAST NAME: DOE JO.
MEDI SVC
RESERVATION NOT
FOUND. MEDI SVC
REVERSAL REJECTED.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

15. If the subscriber does not have a Medi-Services reservation applied, the POS device will display a response message indicating that the Medi-Services reversal was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

MS REVERSAL
NO RECORDED
ELIGIBILITY FOR
12/03.

PREV NEXT PRINT EXIT

F1 F2 F3 F4

16. If the subscriber is not eligible, the POS device will display a "NO RECORDED ELIGIBILITY FOR (MONTH) (YEAR)" message. Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen.

Note: Providers need to verify that the information entered was correct before denying Medi-Cal services to the subscriber.

MS REVERSAL
INVALID PASSWORD

PREV NEXT PRINT EXIT

F1 F2 F3 F4

17. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

**Appendix: List of
Approved Abbreviations**

This appendix lists the abbreviations (and their definitions) used by Medi-Cal in the 271 Eligibility Response transaction.

Amt	Amount
Assoc	Association
Auth	Authorization
CA	California
CCS	California Children's Services
Ctr	Center
Ctrs	Centers
Corp	Corporation
Cnty	County
CMSP	County Medical Services Program
Cov	Coverage
\$	Dollar/Dollars
Fed	Federal
FQHC	Federally Qualified Health Clinic
Fdn	Foundation
GHPP	Genetically Handicapped Persons Program
Grp	Group
Hlth	Health
HCP	Health Care Plan
HIC	Health Insurance Claim
HMO	Health Maintenance Organization
Hosp	Hospital
ID	Identification
Inc	Incorporated
Indep	Independent
IPA	Independent Physician Association
Ind	Indicator
I/P	Inpatient
LTC	Long Term Care
Med	Medical
Medi Svc	Medi-Services
#	Number
OHC	Other Health Coverage
O/P	Outpatient
PHP	Prepaid Health Plan
PCCM	Primary Care Case Management
PCP	Primary Care Physician/Provider
PHC	Primary Health Care
Pgm	Program
Prov	Provider
S.	Southern
Svc	Service
Svcs	Services
SMO	Staff Model Office
Syst	System
Systs	Systems
TPN	Total Parental Nutrition
TAR	Treatment Authorization Request
w/	With